

# ePlan Review

Department Name

*Quick Reference for Plan Files &  
Step by Step Applicant Training*

8/2015

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## What is ePlan Review

ePlan Review is a workflow management system designed to provide a very efficient plan checking process while saving applicants significant time by reducing travel time, time spent at the city and money associated with the traditional paper submission process.



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## Prerequisite

- Download ProjectDox components – this is a requirement
- Turn OFF pop up blockers for the site [www.riversideca.gov/eplans](http://www.riversideca.gov/eplans) Pop Up Blocking is controlled by the tools of your internet browser under Internet Options, Privacy tab, Turn Off Pop-up Blocker
- If using Internet Explorer version 10 (check by selecting Tools on your internet browser, then About Internet Explorer), it must be operated in compatibility mode. When on the website [www.riversideca.gov/eplans](http://www.riversideca.gov/eplans) click the Tools option for the internet browser, select Compatibility View Settings, then add [Riversideca.gov](http://Riversideca.gov) to the Compatibility View website.

Download the components.



[RiversideCa.gov](http://RiversideCa.gov)

## First Time Users

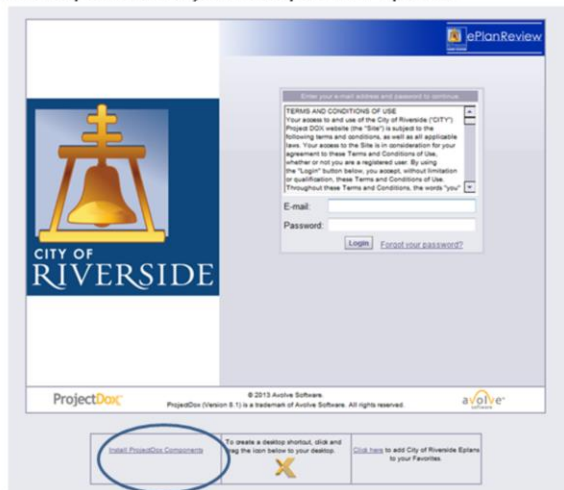
ePlan Review needs to add a few components to your computer to operate effectively.

Turn off Pop-Up blocker

Install the ProjectDox Components

Internet Explorer 10 will need to run in Compatibility Mode

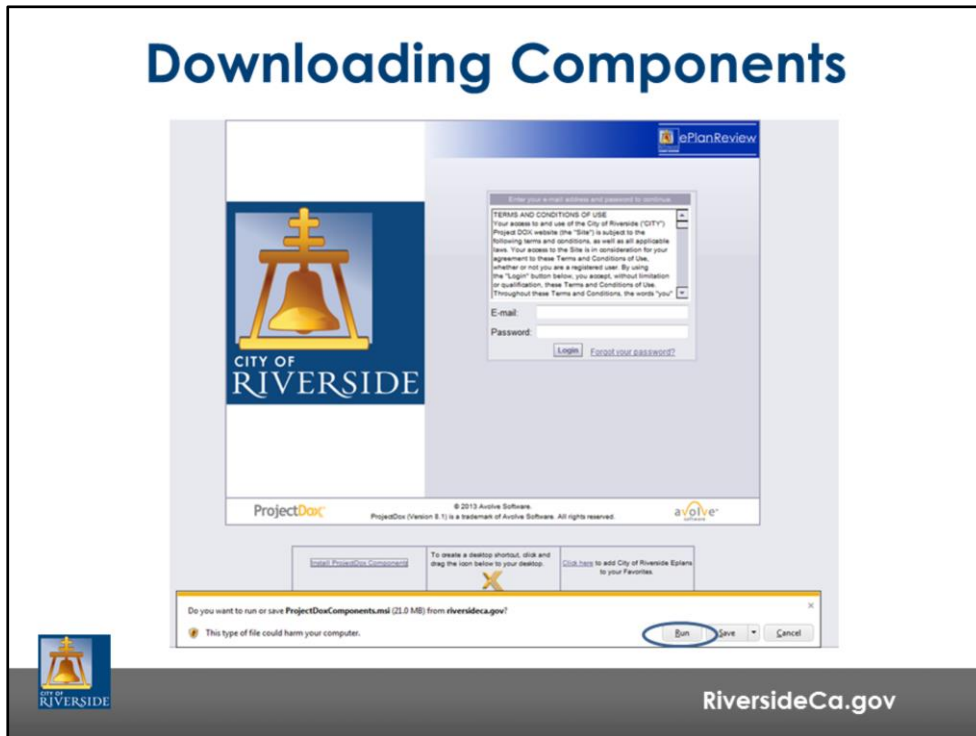
The following screens are representative of the installation process. Your experience may vary depending on your browser and computer settings.



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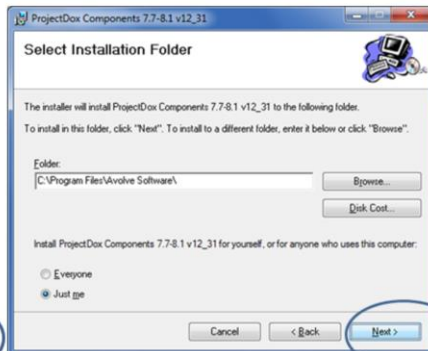
ePlan Review needs to add a few components to your computer to operate effectively. Pop-Up blockers will need to be turned off as the software operates in multiple views. Download the components by clicking the Install ProjectDox Components link. The following screens are representative of the installation process, your experience may vary depending on your browser and computer settings.

# Downloading Components



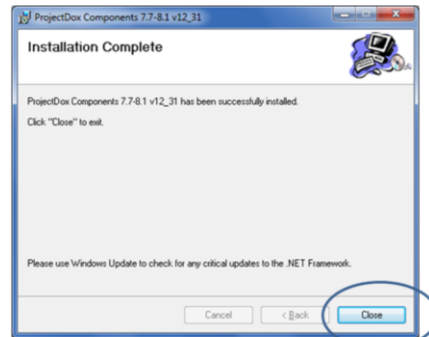
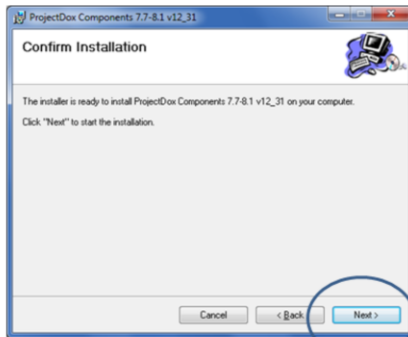
Select Run

## Downloading Components Cont.



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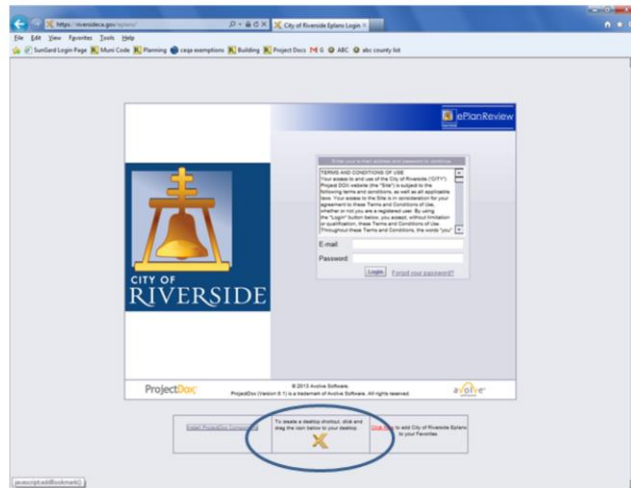
## Downloading Components Cont.



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# Add to the Desktop

To add the software icon to your desktop



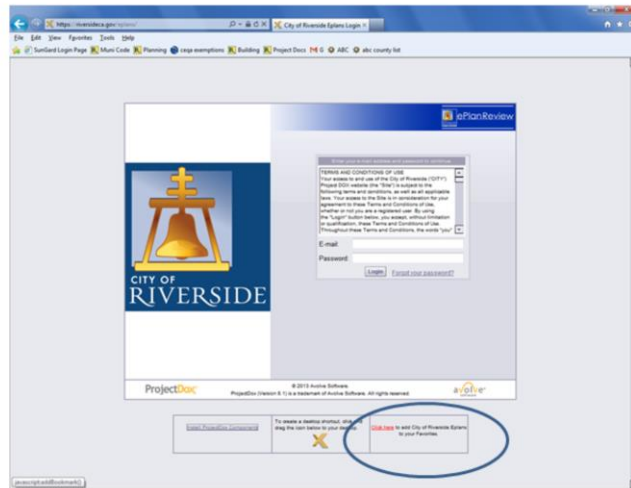
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Click this option to add ePlan Review as a desktop link



# Add to Favorites List

To add the software  
to your internet  
browser's list of  
favorite sites



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Click this option to add ePlan Review to your internet favorites list

## Quick Reference for Plan Files

Plan drawings must be signed, digitally or a scanned signature, prior to uploading.

Drawings must be loaded as single page files with the same orientation (portrait or landscape) as it would be used on a hardcopy plan.

The drawing files need to include an abbreviated reference to the drawing type (structural, electrical, plumbing – see following sheets) to assist with faster review and improved communication.

Re-submission of plan drawings **MUST** use the same name, the same scale and the same orientation (portrait or landscape) as the original files.



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File Naming Standards:

Filenames for drawings submitted for ePlan Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

Extended filenames (i.e., AO.1 address of project, name of applicant – site plan) create a problem if resubmittal is required. Brief filenames are suggested (i.e.; AO.1 – site plan).

PLAN FOLDER – Must be in **Landscape** View Only



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File Naming Standards:

Filenames for drawings submitted through ePlan Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

PLAN FOLDER – Must be in **Landscape** View Only

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#### Required Files

1. An index of drawings must be included, generally on the title sheet (along with other information required by the City's checklist).
2. Cover Sheet – project cover sheet must be included in the submittal.
3. Index Sheet – project index sheet must include all plans with title designations.

Example: A002- Second Level Floor Plan.



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**FILE NAMING STANDARDS:**

File names for drawings submitted for ePlan Review should include the first characters of the discipline name, followed by a 3-digit sheet number.

A0.1 – cover sheet	Survey
A1.0 – all site plans, including site demo plan, enlarged area site plans, etc	Civil – C1.0; C1.1; C1.2
A2.0 – demo plans, floor plans, roof plans	Electrical – E1.0; E1.1; E1.2
A3.0 – large scale sections	GN 1.0 – General Notes; GN1.1
A4.0 – exterior elevations	Mechanical – M1.0; M1.1
A5.0 – enlarged plans and sections (example: stairs, walls sections	Plumbing – P1.0; P1.1; P1.2
A6.0 – details	Structural – S1.0; S1.1
A8.0 – control systems	Lighting, Fire Protection, Security, Signage, landscaping, interior elevations



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**DOC FOLDER – 8 ½ X 11**

Alternate Method	T24 Energy
Soils Report	Structural Calculations

ALL DRAWING FILES MUST BE SAVED IN **LANDSCAPE** ORIENTATION.

THE TOP RIGHT OF ALL DRAWINGS MUST BE RESERVED FOR THE CITY OF RIVERSIDE'S ELECTRONIC STAMP.

PLEASE LEAVE THE TOP RIGHT COMPLETELY BLANK ON ALL DRAWINGS

- Dimensions 2" width x 2" height

**FILE TYPE STANDARDS**

The preferred Plan Drawing file formats are DWF, vector PDF and print-ready DWG files. Multi-page plans are not accepted – **single pages are required.**



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# Application Options

PREFERRED FILE TYPES FOR THE  
CITY OF RIVERSIDE INCLUDE PDF,  
DWF, DWG, JPEG



As part of its Business First program, the City of Riverside has launched **ePlan Review** - an efficient, cost effective method for businesses and residents to have plan approved in the plan check process.

**ePlan Review** is designed to save businesses and homeowners valuable time and money during the plan check process, and enables more streamlined routing and more expeditious processing of plans. There is no need to buy software; all that is needed is internet access. ePlan Review accepts over 250 file types, and files can be uploaded and reviewed from anywhere.

This solution is now available for both building plan checks and planning cases. The links to both applications are provided below:

Plans submitted to the Building &  
Safety Division (951) 826-5697



[Building Plan Check Application For Blueprints/Drawings](#)

Plans submitted to the Planning  
Division (951) 826-5371



[Planning Case Application Form](#)

Access to ePlan Review **after** a  
permit or project number has  
been assigned



I have a project already and I am ready to upload my plans:

[Upload my Plans Electronically Now](#)



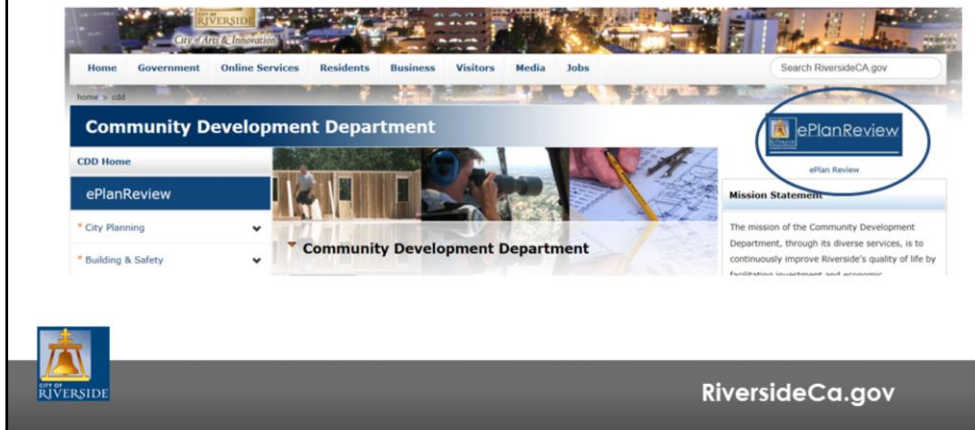
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There are two application types. If you are unsure which type is appropriate for your project, please call our main line at **826-5371**. A third access button has been included for applicants that have completed the application and received an invitation to their project.

# Starting an ePlan Review

The ePlan Review application link is on the CDD, Building & Safety and Planning websites. ePlan Review can be initialized online by any applicant.

ePlan Review starts with an application to start a permit or project. Click the button to access the application page.



The ePlan Review application link is on the CDD, Building & Safety and Planning websites. ePlan Review can be initialized online by any applicant. It can also be added to a current paper permit or project upon request. Call Building & Safety or Planning to request the process and provide them with an email address.



# Application Page

The application page provides a brief description of the ePlan Review process. Scroll to the bottom of this page to view the application options.

The screenshot shows the 'Community Development Department' ePlan Review page. The header includes navigation links (Home, ePlans, Apply) and the department name. A sidebar on the left lists various services: City Planning, Building & Safety, Code Enforcement, Real Property Services, Housing Authority, Historic Preservation, Neighborhoods & Urban Design, Successor Agency, and CDBG (Grants & Funding). The main content area features a banner for 'Online Plan Submittal and Plan Check' and a section for 'ePlan Review Training Available!'. The training section states that training is available on September 20, 2013, from 9:00 to 10:00 a.m. at the Riverside City Hall - City Council Chambers. It also provides a link to a flyer and a phone number (951-826-5495) for more information. The right sidebar contains the 'ePlan Review' logo, a 'Mission Statement' about the department's goal to improve the quality of life, 'CDD Values For Public Service', and 'General Information' including the address (3900 Main Street 3rd Floor, Riverside, CA 92522) and phone number (951) 826-5371. The footer includes the City of Riverside logo and the website address RiversideCa.gov.

Community Development Department

ePlan Review

City Planning

Building & Safety

Code Enforcement

Real Property Services

Housing Authority

Historic Preservation, Neighborhoods & Urban Design

Successor Agency

CDBG (Grants & Funding)

**Online Plan Submittal and Plan Check**

**ePlan Review Training Available!**

To learn how to use ePlan Review and save considerable time and money, attend our **FREE** training.

ePlan Review training is **September 20, 2013 from 9:00 to 10:00 a.m.** - here at **Riverside City Hall - City Council Chambers**.

Please view [this flyer](#) for more information and then [register here](#), or by calling 951-826-5495.

As part of its Business First program, the City of Riverside has launched **ePlan Review** - an efficient, cost effective method for businesses and residents to have plan approved in the plan check process.

**Mission Statement**

The mission of the Community Development Department, through its diverse services, is to continuously improve Riverside's quality of life by facilitating investment and economic development beneficial to the City, its neighborhoods and business districts, and that meet or exceed community expectations.

**CDD Values For Public Service**

Values for Public Service

**General Information**

**Address:**  
3900 Main Street 3rd Floor  
Riverside, CA 92522

**Phone:** (951) 826-5371

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The application page provides a brief description of the ePlan Review process. Scroll to the bottom of this page to view the application options.

# Submitting to Building & Safety

The application for Building & Safety is being used for this demonstration. The same procedures apply for the Planning application. The information fields are very similar to the information requested by Building & Safety's front counter: location, applicant info, owner info and project description

Complete the application form for the Permit/Project.

A screenshot of the Riverside Building & Safety application form. The browser address bar shows "ca.gov/building/application" and the page title is "Building & Safety". The left sidebar lists various links under "Building Home", including "Building & Safety Newsletter", "FAQs & Tips", "Permits", "Alternative & Special Inspection Programs", "Drawings, Forms & Handouts", "Permit Activity Reports", "Permits Online", "Feedback", "Other Links", "Contact Us", and "CDD Home". The main content area is titled "Plan Check Application Form" and includes sections for "Location" (Project Address, Suite) and "Applicant" (Applicant Name, Address).

ca.gov/building/application

**Building & Safety**

**Building Home**

- Building & Safety Newsletter
- FAQs & Tips
- Permits
- Alternative & Special Inspection Programs
- Drawings, Forms & Handouts
- Permit Activity Reports
- Permits Online
- Feedback
- Other Links
- Contact Us
- CDD Home

**Plan Check Application Form**

**Location**

Project Address (or APN)

If your project does not have an address pl  
assessor parcel number (APN).

Suite

**Applicant**

Applicant Name

Address

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The application for Building & Safety is being used for this demonstration. The same procedures apply for the Planning application. The information fields are very similar to the information requested by Building & Safety's front counter: location, applicant info, owner info and project description

## Building & Safety Application Cont.

An email is required for all ePlan Reviews. This account will be used to communicate the status of the project and to request information.

If the owner is not the same as the applicant, the owner's email can also be added to the application to have equal access to the permit or project.

### Applicant

Applicant Name

Address

City

State

Zip

Email

Phone

Cell Phone

### Owner

Use Applicant Info for Owner ☒

Owner Name

Address

City

State

Zip

Email

Phone

Cell Phone

### Project

☒ Non-Residential ☐ Residential

#### Description

Test Application - Build office spaces on the roof of the 3rd floor of City Hall to expand the Public Works floor on the 4th floor



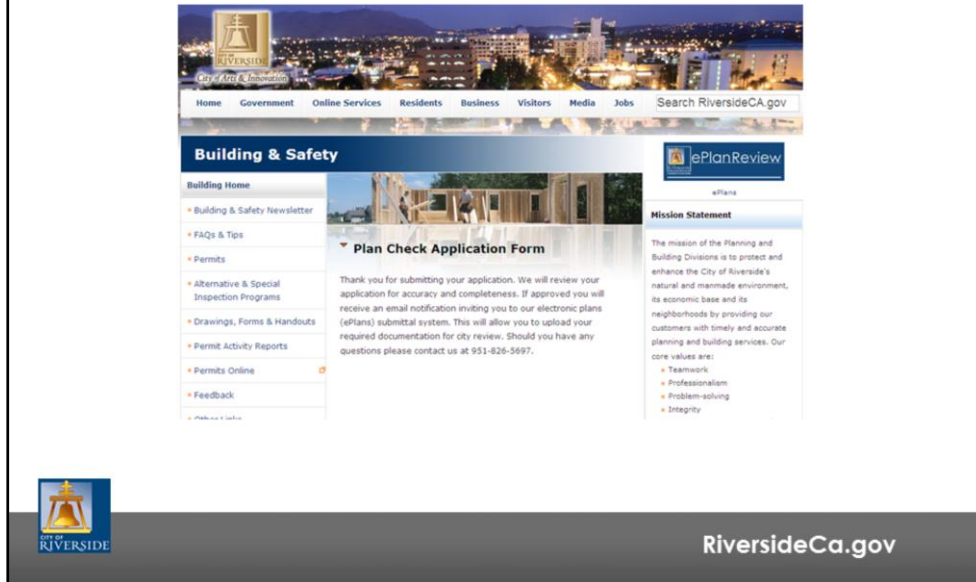
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An email is required for all ePlan Reviews. This account will be used to communicate the status of the project and to request information.

If the owner is not the same as the applicant, the owner's email can also be added to the application to have equal access to the permit or project.

# After Submitting the Application

Upon submitting the application, the screen will refresh with this confirmation message.

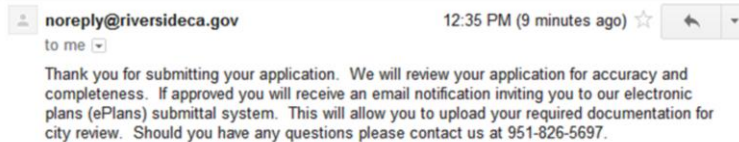


Upon submitting the application, the screen will refresh with this confirmation message.

## Confirmation Message

You will receive a confirmation email to the address included on the application that the request for ePlan Review was received by the City. Please allow **one business day** to receive an invitation to ePlan Review or a request for additional information.

### City of Riverside Plan Check Application Received

The image shows a screenshot of an email interface. At the top, the subject line reads "City of Riverside Plan Check Application Received". Below this, the email is from "noreply@riversideca.gov" and is addressed "to me". The timestamp is "12:35 PM (9 minutes ago)". The body of the email contains a thank you message and information about the ePlan Review process.

noreply@riversideca.gov 12:35 PM (9 minutes ago) ☆

to me ▾

Thank you for submitting your application. We will review your application for accuracy and completeness. If approved you will receive an email notification inviting you to our electronic plans (ePlans) submittal system. This will allow you to upload your required documentation for city review. Should you have any questions please contact us at 951-826-5697.

If you do not receive this confirmation email, please contact 826-5697. Most likely, the application form contained an invalid email address and the application process will need to be repeated.



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You will receive a confirmation email to the address(es) included on the application that the request for ePlan Review was received by the City. Please allow 24 hours to receive an invitation to ePlan Review or a request for additional information.

If you do not receive this confirmation email, please contact 826-5371. Most likely, the application form contained an invalid email address and the application process will be to be repeated.

## What Happens Next

City Staff will receive an email to review the online application.

- Staff will contact you if they require additional information prior to approving the start of the permit/project.
- Any locations for projects outside of the City boundaries will be returned and advised by email.
- If the information is sufficient to start the permit/project, staff will assign a permit/case number and send an invitation to start the ePlan Review process.



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The application will be reviewed by technical, counter staff by either the Building & Safety Division or the Planning Division depending on the application submitted. Staff will carefully review the application to determine the services needed for the project and assign a permit or project case number.

# ePlan Review Invitation email

All new permits and projects in ePlan Review will start with an email invitation into the software.

A user account will be established for each email address.

For first time users, the invitation will include a temporary password and a link to the ePlan Review software.

If your company has multiple users, contact Sharon Alvarez (951) 826-5697 to add multiple accounts.

Existing ePlan Review users will receive invitations to new projects but will not receive a temporary password.



## Permit Plan Check Invitation

Hello TEST COMPANY NAME:

Welcome to the electronic plan check system. This project invitation has been sent to you in response to your permit request. A project has been created to allow you to electronically upload your CAD drawings & other supporting documentation for plan check review. To access your new project, follow this instructions below.

1. Click the Project Access link below
2. Enter your User Login and Temporary Password
3. Click on the Project link on the "My Projects" page
4. Click on the "Drawings" folder for plans and "Documentation" folder for supporting documentation
5. Click the "Upload Files" button and follow the instructions to upload your CAD drawings
6. Your drawings have now been submitted for plan check review

CAD Drawing files supported are: DWG, DGN, DWF, DXF, PDF, TIFF, PLT

User Login	ePlanReviewTest@gmail.com
Temporary Password	B6C34SE
Project Permit #	13-2618
Plan Check Coordinator	Building & Safety Division
Plan Check Coordinator's Email	building@riversideca.gov
<a href="#">Project Permit Access Link</a>	

Temporary Password

Permit number

Link to ePlan Review

Contact the Plan Check Coordinator if you have questions regarding this project. Please do not reply to this email.

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All new permits and projects in ePlan Review will start with an email invitation into the software.

A user account will be established for each email address.

For first time users, the invitation will include a temporary password and a link to the ePlan Review software.

If your company has multiple users, they can have multiple accounts.

Existing ePlan Review users will receive invitations to new projects but will not receive a temporary password.

## Access ePlan Review

The e-mail is the same as provided on the application and the same account that received the invitation email. A temporary password is provided to new ePlan users. If you forget your password, use the *Forgot your password* link. If you experience difficulty accessing your account, please call 826-5371.

Same email as used  
for the application

Password

TERMS AND CONDITIONS OF USE  
Your access to and use of the City of Riverside ("City") ProjectDox website (the "Site") is subject to the following terms and conditions, as well as all applicable laws. Your access to the Site is in consideration for your agreement to these Terms and Conditions of use, whether or not you are a registered user. By using the "Login" button below, you accept, without limitation or qualification, these Terms and Conditions of use. Throughout these Terms and Conditions, the words "you" and "your" mean you and...

E-mail: ePlanReviewTest@gmail.com  
Password: [masked]  
[Login] [Forgot my password?]

ProjectDox © 2013 Active Software  
ProjectDox (Version 5.1) is a trademark of Active Software. All rights reserved. avolve

Click here to add City of Riverside Editors to your Favorites



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The e-mail is the same as provided on the application and the same account that received the invitation email. The password is the temporary one provided (new users only). If you forget your password, use the *Forgot your password* link. If you experience difficulty accessing your account, please call 826-5371.



# Setting up a User Account

Provide a new password and establish the security question and answer. If your account locks out, call 826-5371 to request assistance.

Change temporary password & set security question and answer

Account details

Settings for TEST COMPANY NAME (ePlanReviewTest@gmail.com)

Welcome to City of Riverside ePlans.

Since you currently have a temporary password, you will need to change it to a permanent password and (if you have not done so) enter a security question and answer. This question/answer will be something that only you know, and will enable you to reset your password if you ever forget what it is.

After you have changed your password you will be taken to the main Projects View.

Change Password: **Reset Password Question & Answer:**

New password:  Security question:  (e.g. Name)

Confirm new password:  Security answer:  (e.g. City)

Password must not contain special characters, must contain at least one digit and one alphabetic character, and must be between 8 and 10 characters

**Profile Information**

Contact Information | User Metadata | **Registration** | Groups | Membership

\* Required field

First Name:  TEST Last Name:  COMPANY NAME

Email:  ePlanReviewTest@gmail.com (HTML format)

Title:  Test Applicant

Company:  ePlan Review Test Company

Address 1:  Test Address

Address 2:

City:  Riverside

State/Province:  CA  Postal Code:  92522

Phone:  9518265495 Fax:

Mobile:  Pager:

Stamp:

Language:  en



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Provide a new password and establish the security question and answer. The security question is not a drop down menu, it is a text field. The security answer must be typed exactly as listed in the box for password recovery. If your account locks you out, call 826-5371 to request assistance.

Complete the company contact information. The more information provided, the better service we will be able to provide.

## Plan Review Pre-Screening

City staff will review the drawings and documents for pre-screening.

Pre-Screening will check for receipt of all needed documentation (plan drawings, calculations, etc.) and advise the applicant of fees due. Note: If at prescreen you are DENIED, please reaccept your task and retry.

Upon receipt of all required information and the payment of fees due, staff will simultaneously route the permit or project to the applicable review disciplines.



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Staff will review the documents, determine if additional documents are needed and advise of the amount due for the permit or project. Staff will use ePlan Review to advise the applicant (and owner if email included in the application) of the list of required information and advise regarding the amount due. An electronic payment option is not yet available, we are working on providing a solution for accepting credit cards and e-checks.

## Adding Files

Staff will prescreen each application prior to allowing applicants access to upload the plan files and documents for the permit or project. You will receive an email when ePlan Review will accept documents. This option will be turned off during the plan check process and turned back on for re-submittal.

**Please see Slides 11 – 14 for the file naming convention.**

Click the Project Access to log into the project noted in the email. If desired, click Login to ProjectDox to access your account. All projects you have started or have been invited to will be in your account.

Sample email:



### Upload Confirmation Task Assignment

#### Attention TEST:

When you have completed your upload, please you have completed your upload, please [Login to ProjectDox](#) and complete the "Upload Confirmation" task.

Project:	13-2618
Description:	Test Application - Build office spaces on the ro
Task:	ApplicantUpload
Assigned by:	Carlie Myers
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	



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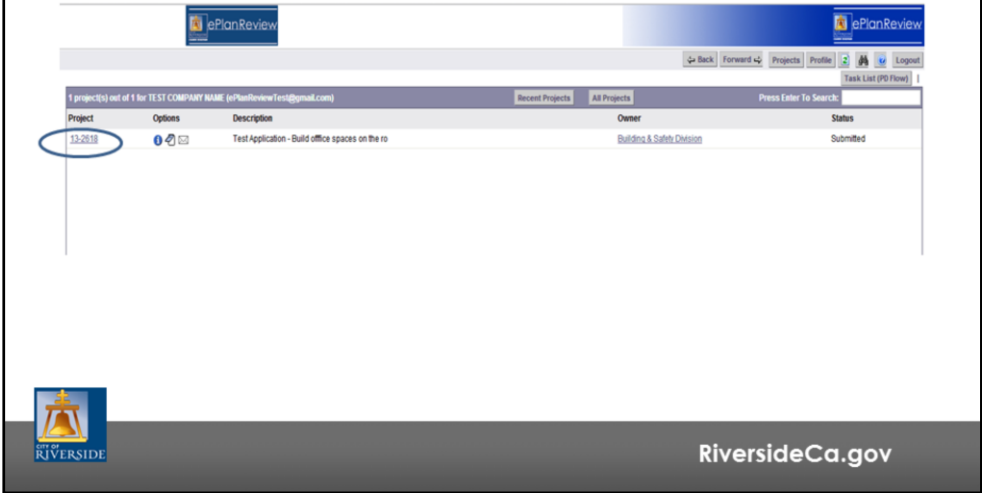
Staff will prescreen each application prior to requesting applicants upload the plan files and documents for the permit or project. You will receive an email when ePlan Review will accept documents. This option will be turned off during the plan check process and turned back on for re-submittal.

Click the Project Access to log into the project noted in the email. If desired, click Login to ProjectDox to access your account. All projects you have started or have been invited to will be in your account.

# Adding Files Cont.

Click the project to open the folders. If you have more than one project in ePlan, all will be listed.

Sample dashboard in ePlan Review:



Click the project to open the folders.

# Adding Files Cont.


Select the appropriate file folder for each document type.

The screenshot shows the iPlanReview web application. The top navigation bar includes links for Back, Forward, Projects, Profile, Info, Notes, and Email. The main content area is titled '13-2618' and 'Main Contact: Test Application - Build office spaces on the ro'. On the left, a sidebar shows a tree view with folders: 'Documents' and 'Supplemental Materials'. The 'Documents' folder is highlighted with a red circle. The main content area displays project details for '13-2618'.

Project Info	Reports
Project Name:	13-2618
Description:	Test Application - Build office spaces on the ro
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Building & Safety Division
Owner's Email:	building@riversideca.gov
Project Admins:	Tim Wilson, Carlie Myers, Daniel Chudy, Ruth Norris, Sharon Alvarez, Building & Safety Division
Status:	Submitted
Due Date:	
Project Start/End:	Start: 7/29/2013 12:43:04 PM   End: 12/9/2014 12:43:01 PM
Pass-Through:	.mov, .wmv, .avi, .htm, .html, .install, .config, .mp4
Incoming Files:	Fax:   Email: <a href="mailto:info@riversideca.gov">info@riversideca.gov</a>
Versioning:	Enabled for this project

Select the appropriate file folder for each document type.

# Adding Files Cont.



13-2618

Main Contact:

Folder: 13-2618/Drawings

Test Application - Build office spaces on the ro


No files currently exist in Drawings.

To upload files into this folder:  
(1) Click the Upload button below  
(2) Follow the instructions in the pop-up window

Large files may take a few minutes to be processed. Click the Refresh button at the top of the page to refresh your list of files.

[View Folders](#) [Upload Files](#) [Upload Files](#)

Project Info	Reports
Project Name:	13-2618
Description:	Test Application - Build office spaces on the ro
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Building & Safety Division
Owner's Email:	buildinfo@versideca.gov
Project Admins:	Tim Wilson, Carlie Myers, Daniel Chudy, Ruth Norris, Sharon Alvarez, Building & Safety
Status:	Submitted
Due Date:	
Project Start/End:	Start: 7/29/2013 12:43:04 PM   End: 1/29/2014 12:43:01 PM
Pass-Through:	.mov, .wmv, .avi, .htm, .html, .install, .config, .mp4
Incoming Files:	Fax:   Email: 40@ProjectDox.YourCompanyDomain.com
Versioning:	Enabled for this project



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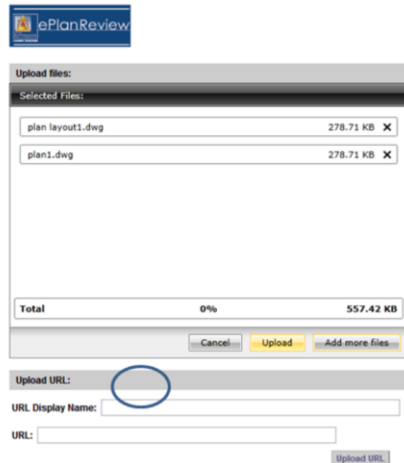
## Adding Files Cont.

The screenshot shows the 'ePlanReview' web application interface. At the top left is the 'ePlanReview' logo. Below it is a section titled 'Upload files:'. Inside this section is a large box labeled 'Selected Files:'. To the right of this box, a blue arrow points from the text 'Drag the file(s) into the box or' to the 'Selected Files' box. Below the 'Selected Files' box is a 'Browse...' button. A second blue arrow points from the text 'Browse your computer to select file(s)' to the 'Browse...' button. Below the 'Upload files:' section is an 'Upload URL:' section. It contains a 'URL Display Name:' text input field, a 'URL:' text input field, and a 'Download URL' button. At the bottom left is the 'City of Riverside' logo. At the bottom right is the text 'RiversideCa.gov'.

Files can be uploaded by either dragging them from your desktop into the Selected Files box or by browsing for files on your computer.

## Adding Files Cont.

The files to be uploaded will be listed in the Selected Files box. When ready, click Upload to add all documents into the project/permit



The screenshot shows the ePlanReview web interface. At the top is the 'ePlanReview' logo. Below it is a section titled 'Upload files:'. Inside this section is a 'Selected Files:' box containing two entries: 'plan layout1.dwg' and 'plan1.dwg', both listed as 278.71 KB with an 'X' icon to the right. Below the file list is a progress bar showing 'Total' at '0%' of '557.42 KB'. At the bottom of the upload section are three buttons: 'Cancel', 'Upload' (highlighted in yellow), and 'Add more files...'. Below the upload section is an 'Upload URL:' section with a blue circle around the 'Upload URL:' label. This section includes a 'URL Display Name:' text box, a 'URL:' text box, and an 'Upload URL' button.



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The files to be uploaded will be listed in the Selected Files box. When ready, click Upload.



# Confirm Upload Complete

You will receive an email requesting confirmation that the files loaded into the project are the complete set needed for submission. This process is how you communicate with staff that you are ready to begin the plan check process.

Sample email:



## Upload Confirmation Task Assignment

### Attention TEST:

When you have completed your upload, please you have completed your upload, please [Login to ProjectDox](#) and complete the "Upload Confirmation" task.

Project:	13-2618
Description:	Test Application - Build office spaces on the ro
Task:	ApplicantUpload
Assigned by:	Carlie Myers
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	



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You will receive an email requesting confirmation that the files loaded into the project are the complete set needed for submission. This process is how you communicate with staff that you are ready to begin the plan check process

# Starting the Plan Review

You will see the files uploaded for the permit or project. When you are done loading, click the *Tasks and Workflow* option. Tasks and Workflow control the file permissions for the plan check process.

The screenshot displays the ePlanReview web application. At the top, the title '13-2618' is visible. Below it, the 'Main Contact' section shows 'Folder: 13-2618/Creatio' and '2 Files - 2 New'. The 'Test Application - Build office spaces on the ro' is also listed. The 'View Folders' section on the left shows two folders: 'eplan\_images' and 'eplan\_files', both containing files named 'TEST COMPANY NAME'. The 'Upload Files' section is also visible. The 'Project Info' tab is active, showing details for project 13-2618. The 'Reports' tab is also visible. The 'Tasks & Workflow' button in the top navigation bar is circled in blue.

Project Info	
Project Name:	13-2618
Description:	Test Application - Build office spaces on the ro
Project Image:	No image exists
Location:	
Contact:	
Contact's Email:	
Phone:	
Cell Phone:	
Pager:	
Project Owner:	Building & Safety Division
Owner's Email:	buildinfo@riversideca.gov
Project Admins:	Tim Wilson, Carlie Myers, Daniel Chudy, Ruth Norris, Sharon Alvarez, Building & Safety Division
Status:	Submitted
Due Date:	
Project Start/End:	Start: 7/29/2013 12:43:04 PM   End: 12/9/2014 12:43:01 PM
Press-Through:	mov, wmv, avi, flm, html, install, config, mp4
Incoming Files:	Fax:   Email: <a href="mailto:info@ProjectDoc&gt;YourCompanyDomain.com">info@ProjectDoc&gt;YourCompanyDomain.com</a>
Versioning:	Enabled for this project

You will see the files uploaded for the permit or project. When you are done loading, click the Tasks and Workflow option. Tasks and Workflow tell ePlan Review that you have completed uploading the necessary files.

## Starting the Plan Review Cont.

This screen will appear when you have completed submitting files. *Upload Complete* will tell City staff that they need to begin the plan review process. *Save and Close* means “save what I have done, but I am going to come back later to add more”. **Until Upload Complete is selected, the project status will remain with the applicant.**

Review Information Permit Information Global File Compare Resources Checklist Report (0) Routing Slip

Building Technician: Carlie Myers ( cmyers@riversideca.gov )  
Review Cycle: 1  
Workflow/Activity Name: Start\_Building\_Plan\_Review / ApplicantUpload  
Activity Instructions:   
Current User Logon: TEST COMPANY NAME ( ePlanReviewTest@gmail.com)

After you have successfully uploaded all required plans/documents please select (Upload Complete) button.

Upload Complete Save And Close

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This screen will appear for you to advise that you are done submitting files. *Upload Complete* will tell City Staff that they need to begin the plan review process. *Save and Close* is equal to saying “save what I have done, but I am going to come back later to add more”. Until *Upload Complete* is selected, the project status will remain with the applicant.

## Plan Check

Each reviewer will have the opportunity to review, make comments, request changes, and/or provide conditions to the applicant.

When **all** required reviewers have completed the plan check task, the list of comments, corrections and or conditions will be sent by City staff to the applicant via email.

The applicant will have access to review each mark up and make the required adjustments to the plan or documents. Applicants will now have access to upload new files to the permit or project.

Only plan files with corrections need to be re-submitted. **Resubmitted files must have the same file name as the original document.** (See sheets 11 - 14). ePlan Review will version each file, putting the most recent on top, thus providing plan check staff with a faster, more efficient review process.



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The paper plan review process will be routed to each department via ePlan Review. All plan check will be done at the same time and allow the different departments view only access to the conditions or corrections of each other. Upon final plan check from all required departments, the list of corrections/conditions/markups will be emailed to the applicant. The applicant will then be able to log into ePlan Review to see the requested corrections and make those changes to the plans. Resubmission of the files requires using the exact file name as originally uploaded to the project. This feature provides all of the plan reviewers an immediate versioning and thus expedites the plan review process.

# Accepting the Task for Corrections

Tasks and Workflow will start the process

The screenshot displays the ePlanReview web application interface. At the top, the 'ePlanReview' logo is visible on the left, and a navigation bar on the right contains links for 'Go Back', 'Project Reports', 'Tasks & Workflow' (which is circled in red), 'Info', 'Notes', and 'Email'. Below the navigation bar, the main content area shows project details for project 13-2618. The project name is '13-2618', and the description is 'Test Application - Build office spaces on the 10'. The project image is 'No image exists'. The location is 'Location:'. The contact information includes 'Contact: Contact's Email: Phone: Cell Phone:'. The project owner is 'Building & Safety Division' with email 'building@riversideca.gov'. The project admins are 'Tim Wilson, Carlie Myers, Daniel Chudy, Ruth Norris, Sharon Alvarez, Building & Safety Division'. The status is 'Resubmit Request'. The due date is 'Start: 7/29/2013 12:43:04 PM | End: 10/29/2014 12:43:01 PM'. The file through is 'mov, wmv, avi, flm, html, install, config, mp4'. The incoming files are 'Fax: | Email: 404@riversideca.gov'. The versioning is 'Enabled for this project'.

**Project Info** **Reports**

Project Name:	13-2618
Description:	Test Application - Build office spaces on the 10
Project Image:	No image exists
Location:	Location:
Contact:	Contact's Email:
Phone:	Cell Phone:
Project Owner:	Building & Safety Division
Owner's Email:	building@riversideca.gov
Project Admins:	Tim Wilson, Carlie Myers, Daniel Chudy, Ruth Norris, Sharon Alvarez, Building & Safety Division
Status:	Resubmit Request
Due Date:	Start: 7/29/2013 12:43:04 PM   End: 10/29/2014 12:43:01 PM
File Through:	mov, wmv, avi, flm, html, install, config, mp4
Incoming Files:	Fax:   Email: 404@riversideca.gov
Versioning:	Enabled for this project

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Tasks and Workflow will start the process

## Accepting the Task for Corrections Cont.

Click OK to accept the task. This feature is included for applicants that have provided project access to multiple staff members or other vested parties involved in the project. Accepting the task moves the workflow to the responsible user.


The screenshot displays the iPlanReview web application. The main content area shows a table of tasks. A modal dialog box is open, asking for confirmation to accept a task. The dialog has an 'OK' button circled in blue.

Task	Attached To	Status	Created On	Updated On	Updated By	Action
Application for Conditional Use Permit	Applicant	Pending	7/29/2013 1:48:13 PM	7/29/2013 1:48:13 PM		

Page 1 of 1 (1 items)

The page at <https://riversideca.gov> says:

Do you want to accept this task?

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Click OK to accept the task. This feature allows companies to have multiple staff members or other vested parties involved in the project. Accepting the task moves the workflow responsible to the user clicking OK.

# Review Corrections

This sample email advises that the plan check process has been completed and corrections are needed. Access the project to view the corrections.



## Review Correction Request Task Assignment

### Attention TEST:

Your plan review submission for Project: 13-2618 has been reviewed and corrections have been requested. You may review correction comments and requirements by accessing the ProjectDox site.

When corrected plans and/or documents are ready for re-submittal, please [Login to ProjectDox](#) and follow the instructions provided for re-submittal.

Please be advised when re-submitting plans and/or documents:

- All corrections must be uploaded using the same file names as the original submittal
- Once corrections have been uploaded for review, no additional submissions will be accepted unless requested
- Please make corrections within 180 days of this notice to prevent your application from expiring.

Project:	13-2618
Description:	Test Application - Build office spaces on the ro
Task:	ApplicantResubmit
Assigned by:	Carlie Myers
<a href="#">Project Access</a>   <a href="#">Login to ProjectDox</a>	



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This sample email advises that the plan check process has been completed and corrections are needed. Access the project to view the corrections.

# Viewing Changemarks

The workflow will show the changemarks requested by all of plan check review staff involved in the project. Click into the files to view the markup, the details will be listed on the same line as the thumbnail image.

Review Information

Permit Information

Global File Compare

Resources

Checklist Report (0)

Routing Slip

Building Technician

Review Cycle

Workflow/Activity Name

Activity Instructions

Current User Logon

Carlie Myers ( cmyers@riversideca.gov )

1

Start\_Building\_Plan\_Review / ApplicantResubmit


Please review all sections of the eForm and drawing markups and resubmit the required information prior to completion of task.

TEST COMPANY NAME ( ePlanReviewTest@gmail.com)

CHANGE MARKS

Filter by Department:

[Click Here to Load Changemarks...](#)

Thumbnail	File	Date	Department	File	Markup	Description	Details	Applicant Response
	1		Building Non-Struct Comm	plan1.dwg	<a href="#">Clickers Building</a>	Men's Room Access	ADA requires additional square footage	

Save Changemark Updates



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## Project Status when Pending Corrections

The status of the workflow will change back to the applicant to re-submit files.

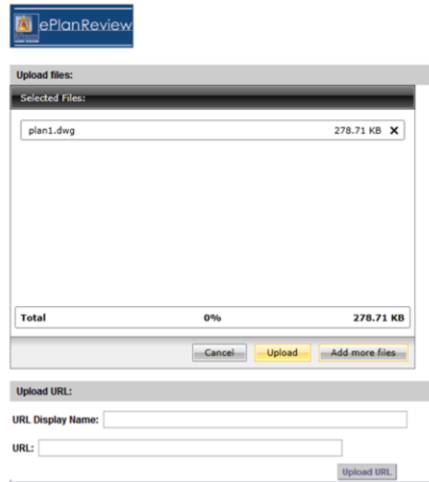
The screenshot displays the ePlanReview web application interface. At the top, the header includes the ePlanReview logo and navigation links: Back, Forward, Projects, Profile, Project Reports, Tasks & Workflow, Info, and Notes. Below the header, the main content area shows a task list for project 13-2618. The task list has columns for Task, Attached To, Status, Created On, Updated On, and Updated By. A task is listed with the subject 'Test Application - Build office spaces on the ro', attached to 'Applicant@resubmit', with a status of 'Accepted', created on 7/29/2013 1:48:13 PM, and updated on 7/29/2013 1:52:30 PM by ePlanReviewTest@gmail.com. The email address 'Applicant@resubmit' is circled in blue. On the left side, there is a sidebar with 'View Folders' and 'Upload Files' sections. The 'View Folders' section shows a tree view with folders like '13-2618' and '13-2618-1'. The 'Upload Files' section shows a list of files with names like 'eplan\_Jessell.dwg' and 'eplan.dwg', each with a size of 279 KB and a timestamp of 7/29/2013 1:13:45 PM. The footer of the page includes the City of Riverside logo and the text 'RiversideCa.gov'.

Task	Attached To	Status	Created On	Updated On	Updated By
Test Application - Build office spaces on the ro	Applicant@resubmit	Accepted	7/29/2013 1:48:13 PM	7/29/2013 1:52:30 PM	ePlanReviewTest@gmail.com

The status of the workflow will change back to the applicant to re-submit files.

## Uploading Corrected Files

The process to re-upload files is exactly the same as the original file upload. **Revised files MUST use the same file name, orientation (portrait or landscape) and scaling for re-submission.**



The screenshot shows the ePlanReview web application interface for uploading files. At the top left is the ePlanReview logo. Below it is a section titled "Upload files:". Under this section is a "Selected Files:" area containing a table with one row: "plan1.dwg" and "278.71 KB" with a close icon. Below the table is a progress bar showing "Total" at "0%" for "278.71 KB". At the bottom of this section are three buttons: "Cancel", "Upload", and "Add more files...". Below the "Upload files:" section is an "Upload URL:" section. It contains two input fields: "URL Display Name:" and "URL:". To the right of the "URL:" field is an "Upload URL" button.



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The process to upload file is exactly the same as the original file upload. Revised files **MUST** use the same file name for re-submission.

## Confirmation of Re-submitted Files

Using the same name creates a versioning process, the most recent always on top, and makes for a much faster plan review process. Uploading revised files with new names will create a formal correction to submit under the same file name.



Using the same name creates a versioning process, the most recent always on top, and makes for a much faster plan review process. Uploading revised files with new names will create a formal correction to submit under the same file name.

## Complete the Re-Submission

When all of the corrected files have been loaded, you will need to advise staff that your portion of the process has been complete. Click the Tasks & Workflow button

The screenshot displays the ePlanReview web application interface. At the top, the 'ePlanReview' logo is visible. Below it, the main contact information for '13-2618' is shown, including the folder path '13-2618\Corrections' and the project name 'Test Application - Build office spaces on the ro'. A navigation bar at the top right contains buttons for 'Back', 'Forward', 'Project Report', and 'Tasks & Workflow', with the latter being circled in blue. The left sidebar shows a list of uploaded files, including 'elms.ltrns' and 'elms.ltrns', each with a thumbnail and file details. The main content area features a table with the following columns: Task, Attached To, Status, Created On, Updated On, and Updated By. The table contains one row with the task 'applicantResubmit', attached to 'Applicant', with a status of 'Accepted', created on '7/29/2013 1:48:13 PM', updated on '7/29/2013 1:52:39 PM', and updated by 'ePlanReviewTest@gmail.com'. The footer of the page includes the 'City of Riverside' logo and the text 'RiversideCa.gov'.

Task	Attached To	Status	Created On	Updated On	Updated By
applicantResubmit	Applicant	Accepted	7/29/2013 1:48:13 PM	7/29/2013 1:52:39 PM	ePlanReviewTest@gmail.com

When all of the corrected files have been loaded, you will need to advise staff that your portion of the process has been complete. Click the Tasks & Workflow button

## Completing Re-Submission

A very similar form to one used for the first submittal will require confirmation from the applicant that they are done uploading files. Scroll down this form to the screen listed in the next slide.

The screenshot shows the ePlanReview web application interface. At the top, there is a blue header with the "ePlanReview" logo and the "CITY OF RIVERSIDE" seal. Below the header, a navigation bar contains tabs: "Review Information", "Permit Information", "Global File Compare", "Resources", "Checklist Report (0)", and "Routing Slip". The "Review Information" tab is active, displaying a form with the following fields:

Building Technician	Carlie Myers ( cmyers@riversideca.gov )
Review Cycle	1
Workflow/Activity Name	Start_Building_Plan_Review / ApplicantResubmit
Activity Instructions	Please review all sections of the eForm and drawing markups and resubmit the required information prior to completion of task.
Current User Logon	TEST_COMPANY_NAME ( ePlanReviewTest@gmail.com)

Below the form, there is a blue bar labeled "CHANGEMARKS". Underneath this bar, there is a "Filter by Department:" label followed by a search input field and a magnifying glass icon. A link "Click Here to Load Changemarks..." is also present. At the bottom of the page, there is a footer with the "CITY OF RIVERSIDE" seal on the left and "RiversideCa.gov" on the right.

A very similar form to one used for the first submittal will require confirmation from the applicant that they are done uploading files. Scroll down this form to the screen listed in the next slide.

## Final Step for Re-Submission

The workflow will require confirmation that the checklist items were met. When done, click Complete to start plan check. This process will repeat until the project is deemed approved. Approved permits and projects are Stamped and the files will move into an Approved Files (folder not visible until approved).

[illegible]

At the re-submission stage, the workflow will require confirmation that the checklist items were met. When done, click Complete, to advise staff that the resubmitted files are ready for plan checking. The Save and Close button is the same as “I’m saving the current process, I am closing the application, I will be back later to click Complete”. If additional corrections are needed from the first submittal, the same cycle will repeat until the project is deemed approved. Approved permits and projects are Stamped.

# Stamped Plans

An email will be sent to the applicant(s) advising that the permit or project has been approved. Once the permit fees have been paid, the plans will be stamped and released for duplication. All approved files will be in a file labeled "Approved files". The stamped plans include the permit or project number. All approved files will be available for downloading by the applicant(s). A stamped printed copy of the plans shall be made available at the job site for the Building Inspector's visit and inspection review.



## New Batch File Stamp Notification

One or more files have been batch stamped and added to the project listed below.

Project:	13-2618
Path:	13-2618\Approved
Stamped by:	Carlie Myers
<a href="#">Stamped Files Access</a>   <a href="#">Login to ProjectBox</a>	

Original files that were stamped:

1. [plan layout1.dwg](#)
2. [plan1.dwg](#)



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An email will be sent to the applicant(s) advising the permit or project has been approved. All approved files will be moved to a file folder in the project labeled "Approved files". The stamped plans will include the permit or project number.

## City Contact Info

For questions, concerns, password reset, additional user accounts, file concerns, please contact:

- Building & Safety Division: Building Permit Technician Sharon Alvarez at [sjalvarez@RiversideCa.gov](mailto:sjalvarez@RiversideCa.gov) or (951) 826-5697
- Planning Division: Senior Planner Travis Randel at [trandel@RiversideCa.gov](mailto:trandel@RiversideCa.gov) or (951) 826-5371



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